

## CLAIMS

### WE CLAIM:

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1. A method for strategic planning comprising:

assessing a current status of an entity to use as a basis to establish a development direction for the entity;

seeking opportunities for the entity in a market;

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establishing a vision including a value proposition, a mission statement, and a set of desired core competencies;

performing an analysis of the market consistent with the vision to determine a set of profitable market segments from the opportunities;

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establishing a marketing plan consistent with the vision to change the current status of the entity;

prioritizing a product portfolio based on the marketing plan; and

implementing a course of action consistent with the vision and the marketing plan, the course of action moving the entity from the current status to the development direction.

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2. The method of claim 1 wherein seeking opportunities in the market comprises establishing a set of industry trends and a set of revenue pools.

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3. The method of claim 1 wherein performing an analysis comprises generating a market opportunity map, profit pools and a general market assessment.

4. The method of claim 1 wherein establishing a marketing plan comprises focusing on the set of profitable market segments, the marketing plan including a detailed market assessment, a product life cycle and a target firm profile.

5. The method of claim 1 wherein prioritizing the product portfolio comprises using a set of financial criteria.

6. The method of claim 1, further comprising reviewing the vision, the opportunities, analysis of the market and the marketing plan by a senior staff.

7. The method of claim 1 wherein establishing a vision comprises determining the value proposition, determining a value proposition comprises:

determining a set of disciplines for each value proposition;

ranking the disciplines; and

determining the value proposition using a qualitative analysis.

8. The method of claim 1 wherein establishing a vision comprises establishing the mission statement, establishing the mission statement comprises:

analyzing a current direction of the entity;

laying a groundwork for a future direction for the entity;

encompassing an organizational culture into the mission statement that makes the mission statement clear and brief and directed to an audience that receives the mission statement; and

presenting the mission statement to the audience using a chosen suitable media.

9. The method of claim 1 wherein establishing a vision comprises determining the set of core competencies, determining the set of core competencies comprises:

determining the set of product core competencies based on a industry trend and a revenue pool;

performing an analysis to determine the set of desired product core competencies;

determining current level of the desired set of core competencies;

determining process core competencies based on the industry trends and the value proposition; and  
prioritize the process core competencies.

5           10. The method of claim 1 wherein performing the analysis of the market comprises:

mapping market opportunities to form a market opportunity map;  
determining a profit pool; and  
performing a general market assessment.

10           11. The method of claim 10 wherein determining the profit pool comprises:  
prioritizing each market identified in the market opportunity map;  
determining five-year cumulative profits for a top market segment; and  
15           re-prioritizing the market opportunity map based on the five-year cumulative profits.

12. The method of claim 1 wherein establishing a marketing plan comprises:  
performing a detailed market analysis; and  
measuring a product life cycle.

20           13. The method of claim 1 wherein prioritizing the product portfolio comprises using a checklist.

25           14. The method of claim 1 wherein implementing a course of action comprises conducting a merger and acquisition process, the merger and acquisition process includes:

assigning a core team;  
performing a pre-contact assessment of an acquisition candidate;  
initiating contact with the acquisition candidate;

issuing a letter of intent to the acquisition candidate;  
performing a due diligence on the acquisition candidate;  
signing an agreement with acquisition candidate; and  
integrating the acquisition candidate into the business.

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15. An apparatus comprising:

a memory that stores executable instructions for strategic planning; and  
a processor that executes the instructions to:

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assess a current status of an entity to use as a basis to establish a  
development direction for the entity;

seek opportunities for the entity in a market;

establish a vision including a value proposition, a mission statement, and  
a set of desired core competencies;

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perform an analysis of the market consistent with the vision to determine  
a set of profitable market segments from the opportunities;

establish a marketing plan consistent with the vision to change the  
current status of the entity;

prioritize a product portfolio based on the marketing plan; and

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implement a course of action consistent with the vision and the  
marketing plan, the course of action moving the entity from the current status to  
the development direction.

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16. The apparatus of claim 15 wherein instructions to seek opportunities in the  
market comprises instructions to establish a set of industry trends and a set of revenue  
pools

17. The apparatus of claim 15 wherein instructions to perform an analysis  
comprises instructions to generate a market opportunity map, profit pools and a general  
market assessment

18. The apparatus of claim 15 wherein instructions to establish a marketing plan comprises instructions to focus on the set of profitable market segments, the marketing plan including a detailed market assessment, a product life cycle and a target firm profile.

19. The apparatus of claim 15 wherein instructions to prioritize the product portfolio comprises instructions to use a set of financial criteria.

20. The apparatus of claim 15, further comprising instructions to review the vision, the opportunities, analysis of the market and the marketing plan.

21. The apparatus of claim 15 wherein instructions to establish a vision comprises instructions to determine the value proposition, the instruction to determine the value proposition comprises instructions to:

- determine a set of disciplines for each value proposition;
- rank the disciplines; and
- determine the value proposition using a qualitative analysis.

22. The apparatus of claim 15 wherein instructions to establishing the vision for the entity comprises instructions to establish the mission statement, instructions to establish the mission statement comprises instructions to:

- analyze a current direction of the entity;
- lay a groundwork for a future direction for the entity;
- encompass an organizational culture into the mission statement that makes the clear and brief and directed to an audience that receives the mission statement; and
- present the mission statement to the audience using chosen suitable media.

23. The apparatus of claim 15 wherein instructions to establish the vision comprises instructions to determine the set of core competencies, the instructions to determine the set of core competencies comprise instructions to:

determine the set of product core competencies based on a industry trend and a  
5 revenue pool;

perform an analysis to determine the set of desired product core competencies;

determine current level of the desired set of core competencies;

determine process core competencies based on the industry trends and the value  
proposition; and

10 prioritize the process core competencies.

24. An article comprising a machine-readable medium that stores executable instructions for strategic planning, the instructions causing a machine to:

assess a current status of an entity to use as a basis to establish a development  
15 direction for the entity;

seek opportunities for the entity in a market;

establish a vision including a value proposition, a mission statement, and a set of  
desired core competencies;

perform an analysis of the market consistent with the vision to determine a set of  
20 profitable market segments from the opportunities;

establish a marketing plan consistent with the vision to change the current status  
of the entity;

prioritize a product portfolio based on the marketing plan; and

implement a course of action consistent with the vision and the marketing plan,  
25 the course of action moving the entity from the current status to the development  
direction.

25. The article of claim 24 wherein instructions causing a machine to seek opportunities in the market comprises instructions causing a machine to establish a set of industry trends and a set of revenue pools

5           26. The article of claim 24 wherein instructions causing a machine to perform an analysis comprises instructions causing a machine to generate a market opportunity map, profit pools and a general market assessment

10           27. The article of claim 24 wherein instructions causing a machine to establish a marketing plan comprises instructions causing a machine to focus on the set of profitable market segments, the marketing plan including a detailed market assessment, a product life cycle and a target firm profile.

15           28. The article of claim 24 wherein instructions causing a machine to prioritize the product portfolio comprises instructions causing a machine to use a set of financial criteria.

20           29. The article of claim 24, further comprising instructions causing a machine to review the vision, the opportunities, analysis of the market and the marketing plan.

30. The article of claim 24 wherein instructions causing a machine to establish a vision comprises instructions causing a machine to determine the value proposition, the instructions causing a machine to determine the value proposition comprises instructions causing a machine to:

25           determine a set of disciplines for each value proposition;

rank the disciplines; and

determine the value proposition using a qualitative analysis.

31. The article of claim 24 wherein instructions causing a machine to establish the vision for the entity comprises instructions causing a machine to establish the mission statement, instructions causing a machine to establish the mission statement comprises instructions causing a machine to:

5           analyze a current direction of the entity;  
          lay a groundwork for a future direction for the entity;  
          encompass an organizational culture into the mission statement that makes the clear and brief and directed to an audience that receives the mission statement; and  
          present the mission statement to the audience using chosen suitable media.

10           32. The article of claim 24 wherein instructions causing a machine to establish the vision comprise instructions causing a machine to determine the set of core competencies, the instructions causing a machine to determine the set of core competencies comprise instructions causing a machine to:

15           determine the set of product core competencies based on a industry trend and a revenue pool;  
          perform an analysis to determine the set of desired product core competencies;  
          determine current level of the desired set of core competencies;  
          determine process core competencies based on the industry trends and the value  
20   proposition; and  
          prioritize the process core competencies.